



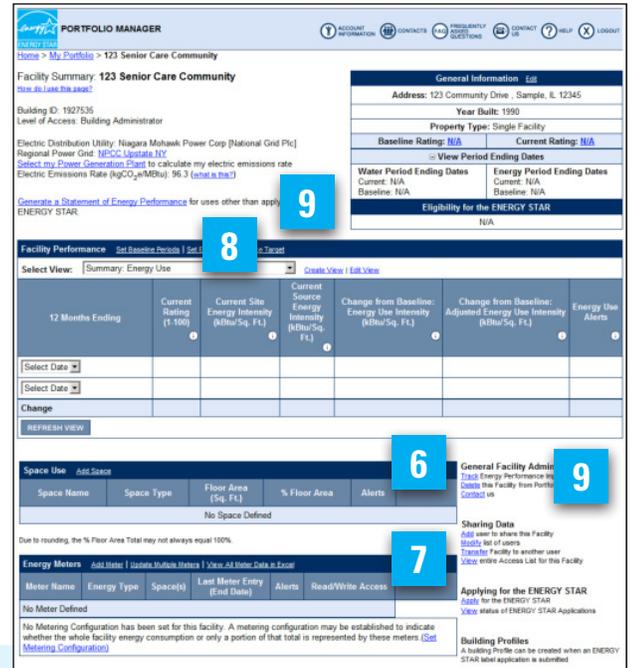
PORTFOLIO MANAGER - QUICK REFERENCE GUIDE

SENIOR CARE COMMUNITIES

Benchmark Your Energy Performance

Use the ENERGY STAR® energy performance scale within Portfolio Manager to evaluate the energy performance of your senior care communities on a scale of 1–100. Earn a score for all of your communities and update the data regularly to take control of your energy costs. See top of page two for eligibility and data needed.

USE PORTFOLIO MANAGER STEP-BY-STEP



STEP	ACTIVITY	ACTION										
1	Access Portfolio Manager	Go to http://www.energystar.gov/benchmark and scroll down to the Login section.										
2	Access your account <ul style="list-style-type: none"> ■ Create a new account ■ Login to an existing account ■ Get a brief system overview 	<ul style="list-style-type: none"> ■ Click REGISTER next to “New User?” ■ Enter username and password and click LOGIN. ■ TAKE THE PORTFOLIO MANAGER TOUR to learn more. 										
3	Review system updates and enter account	From the “Welcome” page, click ACCESS MY PORTFOLIO.										
4	Add a new facility	Click ADD A PROPERTY on the “My Portfolio” page. Select a property type and click CONTINUE.										
5	Enter general facility information	Enter all required information and click SAVE.										
6	Enter space use data <table border="1" data-bbox="126 1465 613 1549"> <thead> <tr> <th>Space Name</th> <th>Space Type</th> <th>Floor Area (Sq. Ft.)</th> <th>% Floor Area</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td colspan="5">No Space Defined</td> </tr> </tbody> </table>	Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts	No Space Defined					Go to “Space Use” section and click ADD SPACE. <ul style="list-style-type: none"> ■ Enter a space name, select the space type, change the effective date if appropriate. Click CONTINUE. ■ Enter all required data. Click SAVE. <i>Repeat for all space types (e.g., parking garage/lot, swimming pools).</i>
Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts								
No Space Defined												
7	Enter total building energy use data <table border="1" data-bbox="126 1661 613 1745"> <thead> <tr> <th>Meter Name</th> <th>Energy Type</th> <th>Space(s)</th> <th>Last Meter Entry (End Date)</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td colspan="5">No Meter Defined</td> </tr> </tbody> </table>	Meter Name	Energy Type	Space(s)	Last Meter Entry (End Date)	Alerts	No Meter Defined					Go to “Energy Meters” section and click ADD METER. <ul style="list-style-type: none"> ■ Enter meter name, type, and units. Answer remaining questions (typically accept defaults). Click SAVE. ■ Enter number of meter entries and start date. Click CONTINUE. ■ Enter energy use and cost. Click SAVE. <i>Repeat for all fuel types used in the building.</i>
Meter Name	Energy Type	Space(s)	Last Meter Entry (End Date)	Alerts								
No Meter Defined												
8	Review and interpret results	At the top of the “Facility Summary” page, review results in the “Facility Performance” section.										
9	Manage account and apply for recognition	<ul style="list-style-type: none"> ■ View baseline and current scores, generate a Statement of Energy Performance, set performance targets. ■ Share data, apply for the ENERGY STAR, create a building profile, and perform other administrative tasks. 										

www.energystar.gov/benchmark

ELIGIBILITY CRITERIA

- At least 50 percent of the units must be assisted living and/or skilled nursing
- Less than 50 percent of the units can be independent living
- Gross square footage of 5,000 or greater
- Occupied for at least 11 of the last 12 months

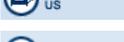
Continuing care retirement communities with predominantly independent living units may be eligible to receive an ENERGY STAR score if certain building characteristics are met. See "How to Classify Your Senior Care Space" posted at www.energystar.gov for additional guidance.

SCORE INTERPRETATION

ENERGY STAR scores are generated on a 1–100 scale, where each point corresponds to 1% of the national building population. Higher scoring communities are better energy performers than lower scoring ones. An ENERGY STAR score of seventy (70) indicates the community is more energy efficient than 70% of its peers nationally. A score of fifty (50) is defined as the industry mean, where 50% of the population performs better and 50% performs worse. Use the guidance below to determine the next steps.

- 1–49** Greatest opportunity for improvement. Investments in new equipment, combined with aggressive low-cost operations and maintenance practices, could have the greatest impact on your bottom line.
- 50–74** Significant opportunity to reap savings. Simple, low-cost operations and maintenance practices, combined with equipment upgrades, could yield significant savings.
- 75–100** Opportunity to gain recognition and demonstrate best practices. Continue to improve and maintain superior performance by focusing on operations and maintenance.

HELPFUL HINTS

- Enter 12 consecutive months of energy data for all fuel types (e.g., electricity, natural gas) without gaps in time.
- When entering data, there is no need to include commas or other punctuation.
- When inputting a facility's energy use, be sure to select the correct units of measurement.
-  **ACCOUNT INFORMATION** Change your password or user profile.
-  **CONTACTS** Maintain contact information for your energy team.
-  **FREQUENTLY ASKED QUESTIONS** View online answers to Frequently Asked Questions.
-  **CONTACT US** E-mail the system for technical assistance.
-  **HELP** Access online user-support information.

DATA NEEDED

- Building or Community Address Including ZIP Code
- Year Built
- Gross Floor Area
- Total Number of Units
- Average Number of Residents
- Total Resident Capacity
- Workers on Main Shift
- Number of PCs
- Number of Commercial Refrigeration/Freezer Units
- Number of Commercial Washing Machines
- Number of Residential Washing Machines
- Number of Residential Electronic Lift Systems
- Percent of the Gross Floor Area that is Cooled
- Percent of the Gross Floor Area that is Heated

FEATURES

- **Consolidate accounts.** From the Facility Summary page, go to "Sharing Data," click "Transfer."



Sharing Data
Add user to share this Facility
Modify list of users
Transfer Facility to another user
View entire Access List for this Facility

- **Share facilities across accounts.**

From the Facility Summary page, go to "Sharing Data," click "Add."

- **Group facilities within an account.** Determine groups (e.g., region, facility type).

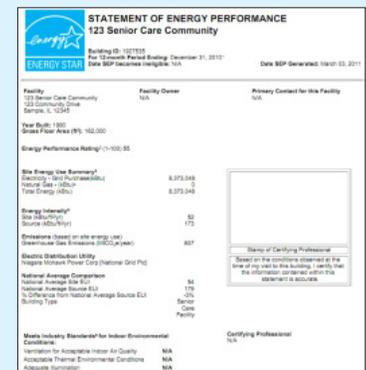
From the My Portfolio



GROUP: All Facilities Create Group | View All

page, click "Create Group."

- **Generate a Statement of Energy Performance.** Use it as a management report and as a transactional document. Also use it to apply to earn the ENERGY STAR if eligible. From the Facility Summary page, click "Generate" (see 8 page one).



STATEMENT OF ENERGY PERFORMANCE	
123 Senior Care Community	
Building ID: 123456	Date SESP Generated: 10/01/2011
Facility: 123 Senior Care Community	Facility Owner: N/A
Address: 12345 Main St	Primary Contact for this Facility: N/A
Year Built: 1990	
Gross Floor Area (GFA): 100,000	
Energy Performance Rating: 75/100 (55)	
Site Energy Use Summary*	
Electricity - (GJ Purchased/Produced)	8,375,040
Natural Gas - (GJ)	0
Total Energy (GJ/yr)	8,375,040
Energy Intensity†	83
Score (0-100)	175
Breakdown (based on site energy use)	
Electricity (GJ/yr)	8,375,040
Natural Gas (GJ/yr)	0
Total (GJ/yr)	8,375,040
Electricity Intensity (GJ/yr)	83
Natural Gas Intensity (GJ/yr)	0
Total Intensity (GJ/yr)	83
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